Note:

THIS FORM CAN BE COMPLETED BY THE MINORS PARENT / LEGAL GUARDIAN AND **RETURNED TO IRISH LIFE** AT THE ADDRESS BELOW, ONCE THE SAVINGS PLAN IS IN PLACE.

\*minor is defined as an individual aged under 18.

While every care has been taken in drafting this form, Irish Life Assurance cannot accept any responsibility for its suitability in any case or for its legal or tax consequences. The form should be referred to the client's solicitor for

examination.



## **DISCHARGE AND INDEMNITY -SMALL GIFTS EXEMPTION PLANS**

This form can only be used on small gifts exemption plans where the plan owner is a minor. It must be completed

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arising directly or indirectly out of any instructions or omissions by me/us in connection with the plan; and

Act (FATCA). The application form that I/we may complete provides information on both CRS and FATCA.

I/we confirm that I/we have obtained legal advice (or decided to waive my/our entitlement to legal advice) prior to signing

to the extent that the above information includes personal data (as defined under the Data Protection Acts 1988 to 2018) of the plan owner, as parent(s)/legal guardian(s) of the plan owner, I/we will provide Irish Life with and request from Irish Life any such data. This personal data may include data Irish Life needs to satisfy its anti-money laundering requirements and data to satisfy its requirements under the Common Reporting Standards (CRS) and the Foreign Account Tax Compliance

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